EERE Program Information Center (EPIC) Prototype Guide

Welcome to the EPIC prototype! This guide answers key questions about the prototype.

What is the prototype?

The EPIC prototype was developed as an early approximation of the new system. The prototype, which is based on the wireframes and requirements presented during the IT Systems Integration (ITSI) webinar series (see links at the end), demonstrates an example of desired content organization and navigation.

Like most prototypes, the functionality of the EPIC prototype is limited. The current prototype does not have any back-end functionality. Parts of the built-out sections have been prepopulated with data to illustrate how data entered in one place will populate other sections.

How was the prototype used?

The EPIC project team used the prototype to elicit user feedback and understand what aspects of a new system will improve existing business processes and facilitate ease of use over current legacy systems.

This version of the prototype allows users to envision improved system navigation, content organization, page layouts, and help features. The prototype was looking for answers to such questions as:

- Is the navigation intuitive?
- Can the content be better organized?
- What information would users like to have more readily accessible?

What functions are currently available in the prototype?

The EPIC prototype illustrates menus of the expected modules— Announcements, Portfolio Management, Project Management, and Budget—representing different EERE business areas. Within the prototype Announcements Module, the following sections are available under Announcement Management: 1) Announcement Details, 2) Funding Opportunity Announcements (FOAs) Requirements Document (FRD) Development and 3) Announcement Development.

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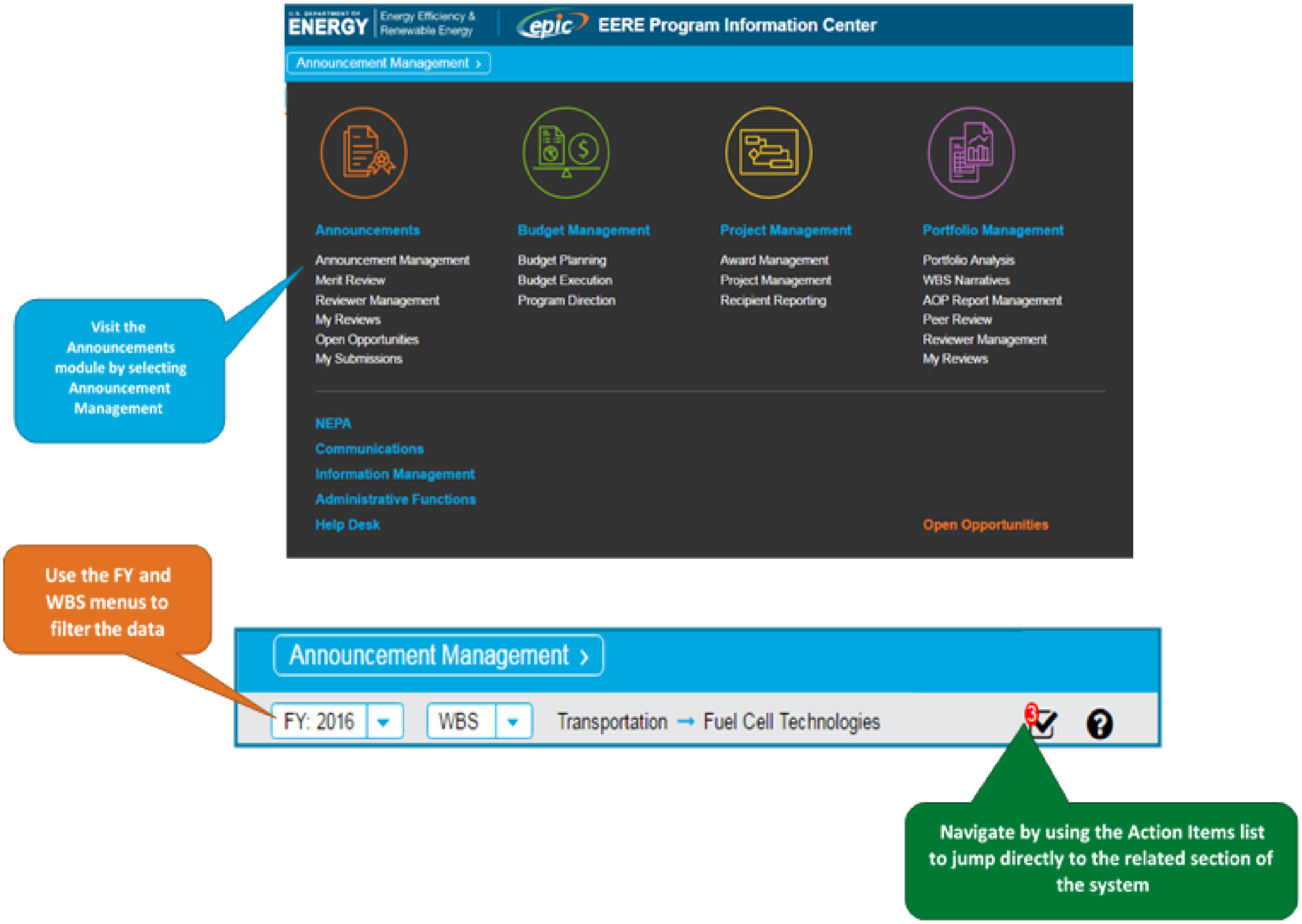
How do I navigate the EPIC prototype?

The prototype URL is https://cpsweb.ee.doe.gov/itsiprototype with username: prototype.user@ee.doe.gov password: p@ssw0rd4eere. Once logged in you can navigate EPIC using the top level mega menu visible, or the Action Item Menu visible on the top right under Select Core Module. The Action Item menu lists system alerts and notifications and allows a user to jump to the section of the system that requires attention. Then select Announcement Management.



What functions are demonstrated in the Announcements module?

The Announcements module is where activities for planning to award selection for funding opportunity announcements (FOAs) and Lab Calls will be conducted. This module is expected to replace both the Funding Opportunity Announcements (FOAs) Tracker and the EERE Funding Opportunity Exchange, known as eXCHANGE.

Features of the prototype Announcements module illustrates how data entered as part of announcement planning then auto-populates fields in the FOA Requirements Document (FRD) and in the FOA publication. This will result in less time spent on data entry, fewer errors and more efficient workflows.

What tasks will be conducted in the Announcement Manage section?

To support announcement planning, you must first create FOAs. As you enter **Announcement Details**, you can link the FOA to existing requests for information, specify Technology Readiness Levels, request mortgage exceptions, and identify high-priority funding areas or crosscuts.

The **FRD Development** requirements include prepopulating forms with information added during announcement planning, eliminating the need to re-enter data. It also leverages common workflow services for approvals. Users need the ability to propose deviations to the FRD and save their preferences for future use.

Announcement Development links to the FRD. If changes are made to this section that affect the FRD, the system will prompt you when an FRD modification is required.

What information is currently available in the Announcement Manage section?

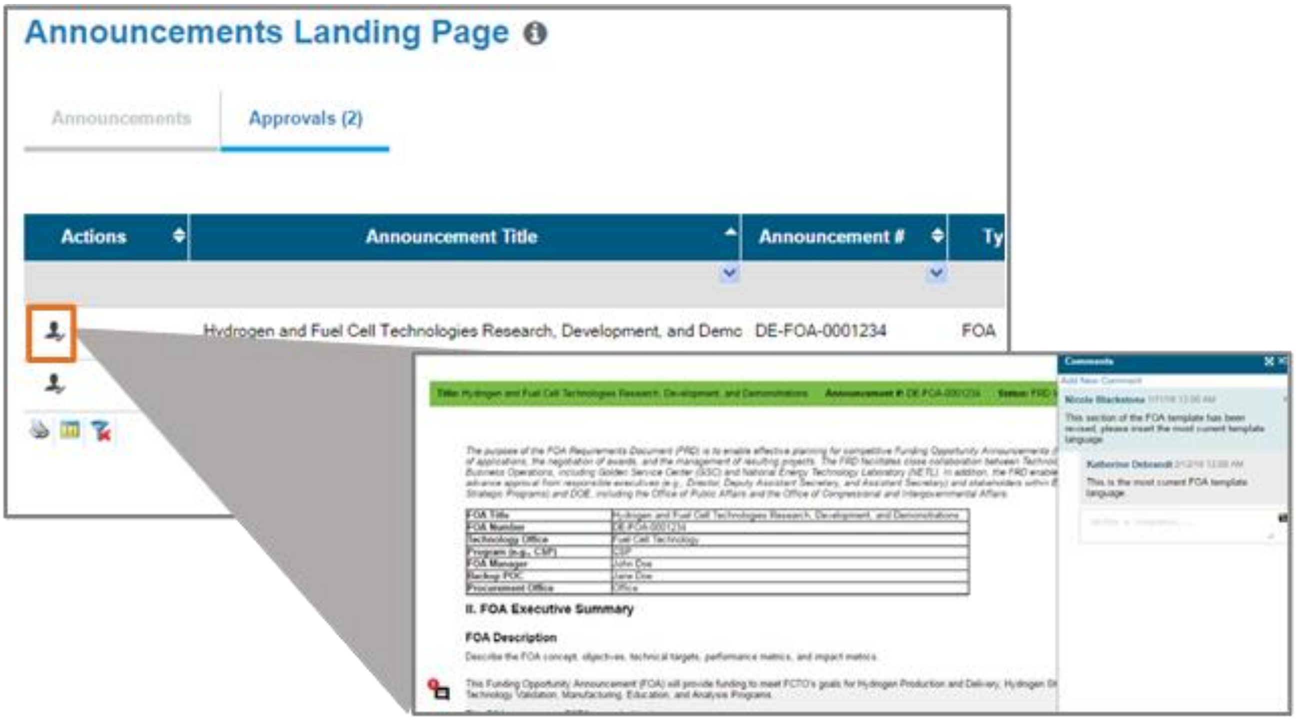
Data has been entered into the first few sections of the Manage Announcements section to help illustrate how information entered one place will be available in other areas of the EPIC system , eliminating the need for duplicate data entry. However, sample data has not been included for the entire section. Users see features that are common to the entire system, including system navigation, page layouts, and help features.

What user roles are available?

User roles have been set up in the prototype to simulate views and access rights for different users.

There are two roles in the current prototype: Fuel Cell Manager (Jane Doe) and Fuel Cell Approver (John Smith). Select the person icon in the top right corner of the prototype to change the role (see image above).

- **Fuel Cell Manager.** This role has the rights in the system of a FOA Manager.
- **Fuel Cell Approver.** In addition to being able to review standard announcement information, this role can access files that need to be approved. These files are accessible via the “Approvals” tab on the Announcements Landing page (see image below) or from the Action Item menu. In the prototype, you can open a sample FRD that is ready for approval and review comments (by selecting the comments icon) and track changes.



What features can be personalized?

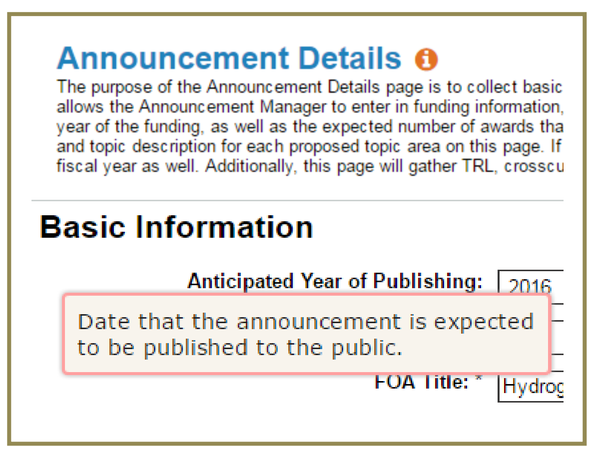
Users need the ability to personalize their views and save these personalization to facilitate access to only the information they need and quickly. System personalization requirements include items such as:

- Presetting the fiscal year and the Work Breakdown Structure to automatically filter the content that is displayed.
- Customizing views of individual tables by reordering or hiding columns or by filtering table content by search term or category.

What type of help features are available?

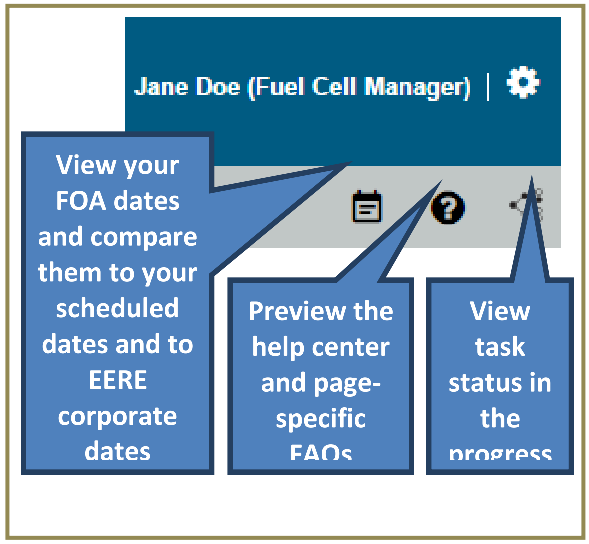
There are multiple help features required to answer questions and provide information users need. These features will need to be available in all sections of the system.

Users need the ability to access instructions and definitions from each page quickly.



These icons include:

- **Timeline.** View a snapshot of a schedule with task dates along with scheduled or corporate dates.
- **Help.** Online user guides in a Help Center for more information and frequently asked questions to the associated business process or policy and system functionality.
- **Progress Indicator.** Task progress tracking and related tasks, responsible points of contact, and current task status.



Where can I find the IT Systems Integration (ITSI) webinar series?

Webinar Name	URL
FOA Planning and FRD Development	https://www.youtube.com/watch?v=AexlCSJEecs
Budget Planning	https://www.youtube.com/watch?v=efhQkS1Mifk
Announcement Development and Submissions	https://www.youtube.com/watch?v=MAH-UEAXtJo
Merit Review	https://www.youtube.com/watch?v=aHBrGoMucWk
Selections	https://www.youtube.com/watch?v=xT1uu4CogJE
Funds Authorization	https://www.youtube.com/watch?v=WoH8kpzdD0c
Award Negotiation	https://www.youtube.com/watch?v=snXPNZcPUVc
Lab AOP Project Management	https://www.youtube.com/watch?v=WpCsko--Crk
Project Monitoring and Modifications	https://www.youtube.com/watch?v=W4k_JP1yCTE
Project Closeout	https://www.youtube.com/watch?v=Li8_KoDyQq4
Portfolio Analysis	https://www.youtube.com/watch?v=Cr7gcGgTQMQ
Lab Annual Operating Plans (AOP) (included in Project Management)	https://www.youtube.com/watch?v=WpCsko--Crk
Peer Review (included in Merit Review)	https://www.youtube.com/watch?v=aHBrGoMucWk
Deobligations, Project Funds Transfers & HQ Funding	https://www.youtube.com/watch?v=4qqZnZHrLLk